

## 14. Session plan: Referral and follow up

Volunteer	
<b>Learning objectives</b>	
By the end of the session participants shall be able to: <ul style="list-style-type: none"><li>• Explain the referral and follow up process.</li><li>• List the importance of making referrals and follow up.</li><li>• List service providers and what they offer.</li><li>• Describe the role of a volunteer in the referral and follow-up process.</li></ul>	
<b>Time allocated</b>	
<ul style="list-style-type: none"><li>• 90 minutes.</li></ul>	
<b>Resources needed</b>	
<ul style="list-style-type: none"><li>• Flipchart or whiteboard</li><li>• Marker pens</li><li>• A local community worker with good knowledge of the local services available is needed as a trainer / resource person for this session.</li></ul>	
<b>Preparation</b>	
Identify: <ul style="list-style-type: none"><li>• A local CBID worker with good knowledge of the local context.</li></ul> Familiarise with: <ul style="list-style-type: none"><li>• Referral module session plan and Participant Manual content.</li></ul> Write: <ul style="list-style-type: none"><li>• Flipcharts of the text within each of the boxes headed <b>Write on BOARD</b> in advance of the session to help the flow.</li></ul> Print: <ul style="list-style-type: none"><li>• A4 copy of each of the 5 CBR Matrix components for activity. Print from session resources folder or from end of session plan. Laminate if you want to reuse.</li></ul>	
<b>Trainer's notes:</b>	
<i>A volunteer should have a good overview of the services available to persons with disabilities in the district, and the systems of identification and referral of persons with disabilities to the various services that they may need to access. This session can be tailored to include familiarisation with specific forms and systems in your context, and should include a trainer who has very good knowledge of the local context. It is also important to clarify reporting and referral lines within the CBID structure – such as when and how a volunteer should refer initially to their CBID Manager/Coordinator who may have more advanced knowledge / skills in some areas.</i>	

## 14.1 Introduction (5 minutes)

	<b>Volunteer</b>	
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**Introduce** the session and read the learning objectives

**Write on BOARD:**

Referral and follow up learning objectives:

- Explain the importance of making referrals and follow up
- List service providers and what they offer
- Describe the role of a volunteer in the referral and follow-up process

## 14.2 Referral (20 minutes)

	<b>Volunteer</b>	
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**Ask** participants to turn to their neighbour and take a minute to discuss what it means to 'refer' a person.

**Acknowledge** responses from a few of the pairs.

**Explain:**

- **Referral** is the act of directing a person to a place where they can get further advice or treatment such as for a consultation, review, or other action. An example would be referring someone in the community to be tested for HIV.

**Explain:**

- One of the key 'roles and responsibilities' of CBID workers identified in the CBR Guidelines is given as: *providing information about services available within the community, and linking persons with disabilities and their families with these services via referral and follow-up.*

**Ask** participants to turn to their neighbour on the other side and take a minute to consider what kind of services might volunteers refer persons with disabilities to.

**Acknowledge** responses.

**Explain:**

- The services that persons with disabilities may be referred to should be guided by the CBR Matrix, national legislation, policies and programmes to ensure that they are assisted holistically. Referral services within a community are required for a variety of issues including health, educational, vocational, and social services. It is important that persons with disabilities have access to all services required just like any other person.
- One aspect of referral for CBID workers to consider is the practical aspects of how people with disabilities can reach the place they are being referred to.

**Write on BOARD:**

- Services available within the community
- Referral may be to specialised services at national, regional or district level
- Provided by government, NGOs, DPOs or the private sector

- Referral may be to specialised services at national, regional or district level, and could be services provided by government, OPDs, NGOs or the private sector. Many persons with disabilities, for example, require referral to specialized rehabilitation services such as for prosthesis, wheelchairs or hearing aids as well as follow-up support to ensure that these services are received and continue to meet their needs on an ongoing basis.
- Persons with disabilities also need general health services in the same way as others. However, there are often barriers preventing persons with disabilities from accessing mainstream services.

**Ask:** What kind of barriers might persons with disabilities face accessing general health services?  
**Acknowledge** responses.

**Write on BOARD:**

- physical access
- transport to services
- communication challenges – lack of different formats
- negative attitudes

CBID programmes need up-to-date information on services that can support persons with disabilities in all areas of their lives.

**Write on BOARD:**

- Early identification

CBID programmes often play a vital role in identifying children in the community who have disabilities and referring them to appropriate services. This can enable them to access services that help them reach their potential, and help their parents and carers to understand their disability and support them.

Children usually develop and reach ‘milestones’ around the same time – such as crawling, walking, making eye contact etc. Volunteers can play an important role in helping parents identify if a child is not reaching milestones in a usual way, and may need to be referred to be assessed and supported.

**Ask** if any participants have had this experience?  
**Acknowledge** responses.

**Ask:** Now considering the livelihood sector, what kind of services might persons with disabilities want to access?  
**Acknowledge** responses.

**Write on BOARD:**

Persons with disabilities might be referred to services providing:

- vocational training
- apprenticeships
- financial services
- career counselling
- employment placement

### 14.3 Follow-up (10 minutes)

	<i>Volunteer</i>	
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**Ask** participants to discuss with their neighbour what 'to follow up' means.

**Acknowledge** responses.

**Explain:**

- **Follow up** is a process of reviewing a situation or an earlier intervention to monitor its status or success. An example of follow up would be to visit a community member who had been referred to a vocational training course to check if they were attending and to discuss any challenges.

**Ask:** Why is follow up important?

**Acknowledge** responses.

**Ask:** What kind of follow-up might be needed after you have referred a person with a disability to a service?

**Acknowledge** responses.

**Explain:**

- Follow-up is critical so that you can see if the referral was effective. For example, did someone with a hearing impairment attend the appointment they were given? Did they receive a hearing aid? Is it working? Are they using it? If not, why not?
- A person could be referred to an educational environment that turns out not to be conducive to their learning if the environment does not meet their specific needs. In this case follow up will highlight this so that another plan can be made.
- Follow up may be with the follow up centre as well as with the person who was referred.
- Follow up isn't a one off event – it's a continuous process.

### 14.4 Activity: Identifying services to which persons with disabilities can be referred (55 minutes)

	<i>Volunteer</i>	
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<b>Activity: Completing Form 3</b>	
Groups	<b>Divide</b> participants into 5 groups and allocate a component of the CBR Matrix to each one.
Instructions	Give each group a flipchart sheet with the name of their CBR Matrix written at the top. Ask the groups to consider the five elements in the component area of the CBR Matrix they have been allocated, and some of the services available to which they might refer people with disabilities. For example, there may be an Inclusive Education Unit who can provide advice to a parent; or a Women's OPD that you might refer a newly disabled woman to join; or an inclusive sports club that you might refer someone to. <b>Ask</b> the groups to focus on identifying places within the district in particular and to write these down on the flipchart and to be ready to share their summaries.

Monitor	<b>Check</b> that groups understand the task. Tell them when half of the time has gone and encourage them to consider places for each of the five elements.
Time	<b>Allow</b> 25 minutes for discussion in groups, then ask each group to take 3-4 minutes to present their list to the others. Allow 1-2 minutes at the end of each presentation for others to add any that are missing (Total time: 50 mins)
Feedback	<b>After</b> each group has presented, invite other groups to add any referral places they may have missed and add these to the lists. At the end, highlight any areas of the Matrix where there seem to be gaps.

**Trainer's notes:**

*Consider typing up the lists from the activity and including in the training report or circulating after the training as a reference document.*

**Ask** if anyone has any personal experience of referral and follow up to share.

**Emphasize** that CBID volunteers are the link between the community and the range of services available to persons with disabilities. Volunteers need to have knowledge of how and where to refer, to give each person with a disability the best chance to achieve inclusion and to be healthy.

**Close** the session.

